Performance Planning - Business Practices Questionnaire

The following questionnaire, along with the data you have sent to ITRE, will give us a more complete picture of how your transit system operates and a framework for setting goals. These questions will help us assess your current business practices and identify both strong points and areas that need improvement. Please complete the questionnaire and return it to ITRE. Answer to the best of your ability and with as much detail as you can.

Instructions for completing this Questionnaire: To fill out this questionnaire, click on the grey area at the end of the question and begin typing your answer. For questions that are multiple choice, or have you select one option from a list, simply click the box(es) next to the answers you wish to select. You can use the "tab" button to move quickly between the answer fields and copy and paste into these fields if needed. After completing the questionnaire, you will need to save the file and send them to ITRE.

Transit System Information:

Transit System Name:
Respondent Name(s) and Position:
Contact Phone Number:
Contact Email Address:
Date Questionnaire was completed:

If more than one person is involved in completing this questionnaire, please indicate who provided each answer or if the answer was created collaboratively.

1. **Job Advertisements and Employee Information:**

   1.a. When the most recent new employee was hired, what kind of advertising or help-wanted ads were placed?

   1.b. Please give the job description of one office staff member (scheduler, dispatch, etc) and the job description for drivers:

   1.c. Were any current employees previously employed with the system in a different position? If so, please list the employee, their current position and their previous position.

   1.d. Please fill out the two accompanying "Employee Information Worksheets" with the requested information. There is one sheet for information about Office Staff, and a separate sheet for Drivers.

2. **Organizational Culture:**

   2.a. Do you have regularly scheduled staff meetings?

   2.b. Describe you last staff meeting giving the date, what was discussed and who attended.

   2.c. On a scale of 1-10, (with 1 being the lowest score and 10 as the highest) how well do you believe your staff works together? Please explain your rating.

   2.d. Please list your organization goals.

   2.e. If you are a part of a parent organization give that organizations name:
   2.e.1.What is the nature of the relationship between your system and this organization?

   2.f. What kind of organization is your transit system? (Please check one box)

- ☐ County Department
- ☐ Private Non-Profit
- ☐ Regional/Multi-County Authority
- ☐ Other (Please explain): _____

3. <u>Operating Policies and Practices: Scheduling and Dispatch</u>

3.a. How long in advance can a passenger schedule a trip?

3.b. When is the cutoff time for taking reservations?

3.c. What are your operating hours?

3.d. Have your operating hours changed in the last 12 months?

3.d.1. If they have changed, please explain why:

3.e. If there is a cancelation, what (if any) changes are made to the run they were assigned?

3.f. If a passenger no shows, what (if any) changes are made to the run they were assigned?

3.g. How does your system differentiate between a cancelation and a no show?

3.h. Do you have a no show policy?

3.h.1.Is this policy approved by your Board?

3.h.2.What is the date of approval? (please attach a copy of the policy)

3.i. Does your system charge for no shows?

3.i.1.If so, is the passenger charged directly, or is the funding source billed?

3.j. Do you have any penalties (such as service suspension) for multiple cancelations or frequent no shows?

3.j.1. Please explain these penalties.

3.k. When are drivers given their manifests?

3.l. When are manifests verified?

3.m. If a driver calls in sick, who covers that driver's trips?

3.m.1. What is the decision making process used?

3.m.2. Who is involved in the rescheduling? Please list each involved employee and their responsibilities in this situation.

3.n. Do you carry passengers out of your county?

3.n.1.Do you have specific days that you provide this service?

3.n.2.If you do carry passengers out of county, please list the top 2 destinations and the days trips are scheduled:

3.o. Please check the boxes for the trip purposes you provide service:

- ☐ Veterans Administration
- ☐ Medical Trips
- ☐ Shopping
- ☐ Vocational Rehab
- ☐ Educational
- ☐ Work First
- ☐ Other Employment
- ☐ Social
- ☐ Other (Please list):

4. <u>Operating Policies and Practices: Maintenance and Vehicles</u>

4.a. What method do you use to track the following:

- Preventative maintenance:
- Unscheduled maintenance:
- Predictive maintenance:

4.b. What maintenance tracking software do you use?

4.b.1.When was the software last updated?

4.c. Describe your policy on vehicle breakdowns and your system's procedure for handling breakdowns.

4.c.1.Please list what each involved employee and their responsibilities in this situation.

4.d. Please attach a copy of your most recent PTMS.

5. <u>Operating Policies and Practices: Interagency Coordination, Trip Brokering and Outstationing:</u>

5.a. Does your system coordinate with other systems?

5.a.1.If so, please list the system names and how often they carry your passengers/you carry theirs.

System Name	How Often You Carry Their Passengers	How often They Carry Your Passengers

5.a.2.What is your billing agreement for these trips?

5.b. Do you broker any trips to taxi companies or outside businesses?

5.b.1. If so, what does the taxi/business charge for this service?

5.b.2.What is the administrative fee for these trips?

5.c. Do you outstation any vehicles? Why or why not?

5.c.1.If you have outstationed vehicles, list their base location(s):

5.d. What were your total service miles for last Tuesday? (Also give last Tuesday's date)

6. Operating Policies and Practices: Planning and Data Utilization

6.a. Describe your system's procedure for service expansion and who is involved with the process.

6.b. What planning activities have you engaged in during the past 18 months?

6.b.1.Who was involved in the planning process?

6.b.2.Please share the 'what if' scenarios your planning involved.

6.c. What are your system's goals?

6.d. What would you like your organization to look like in 5 years?

6.e. List any operational or policy changes that have occurred in the past 6 months. Please state the reason(s) for change.

6.f. Does your county participate by contributing funds to your service?

6.f.1.If so, how much did they contribute in the most recent fiscal year?

6.g. On a scale of 1-10 (with 1 being the lowest score and 10 as the highest) please rate the importance of efficiency to you AND your governing body and explain your ranking. If there are other items that are more important to you or your governing body, please give those as well.

6.h. Give the name or type of reports you run.

- Daily Reports:
- Weekly Reports:
- Monthly Reports:

6.i. How long did it take you to find the answer to question [5.d]?

6.j. What are your planning activities to ensure continuous RGP service during a fiscal year?

6.j.1.When was your last RGP trip last year?

6.j.2.Are RGP trips charged a fixed amount by passenger or does it depend how the trip was scheduled / dispatched? (i.e. added to an existing route or dispatched a new vehicle?)

7. Financial Management: Funding Sources, Rates and Billing

7.a. How are billing rates set?

7.b. Please list your current billing rates including the name of the billing method and funding source.

7.c. What is your newest (most recently acquired) funding source?

7.c.1.When was the source acquired?

7.d. Do you have contracts with most of your funding sources and do you renew them annually?

7.d.1.If not, please describe the process you use.

7.e. Which funding source contract/rate was most recently changed (not including the funding source in the previous question)?

7.e.1.What prompted this change?

7.f. Do the administrative duties you perform differ between funding sources?

7.g. Which funding source requires the most administrative work?

8. <u>Financial Management: Costs and Extra Charges</u>

8.a. What are your fully allocated costs for the following units?

- Hour:
- Mile:
- Passenger Trip:

8.b. What are your extra administrative fees?

8.c. Describe the fuel surcharge in your contracts with funding sources.

8.d. Who is responsible for your yearly operating budget? (ex, if budget information were requested, who would you ask?)

8.d.1. Please describe your budgeting process.

8.e. Do you use a rate- setting model of any kind? If so, please provide an example/copy of the last model used and the data you input/output.

8.f. Please list any funds you receive that have a local match requirement, the amount you receive and who provides these funds.

8.f.1. Describe the formal process to generate the local match?

8.g. In your accounting process, are your expenses broken down by department code (administrative, operational, etc)?

8.g.1.Please give the name of the accounting software you use.

8.g.2.Please attach your complete administrative, operational and capital budget for this fiscal year?

9. <u>Passenger/Community Outreach and Advertising:</u>

9.a. If a new passenger was in need of transportation, how would they find out about your system?

9.b. What questions do you ask to determine new passenger eligibility for service?

9.c. Do you have decals, logos, or other information on the <u>outside</u> of your vehicles?

9.c.1.If so, please describe the logo, decal or information or attach a picture.